

Customer Data What do you need to know?

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What do you need to know?

We need to do a
customer census

We need to record
ED&I information
against individual
tenants

We need to be
able to report
our ED&I data

**ASK WHY,
NOT WHAT**



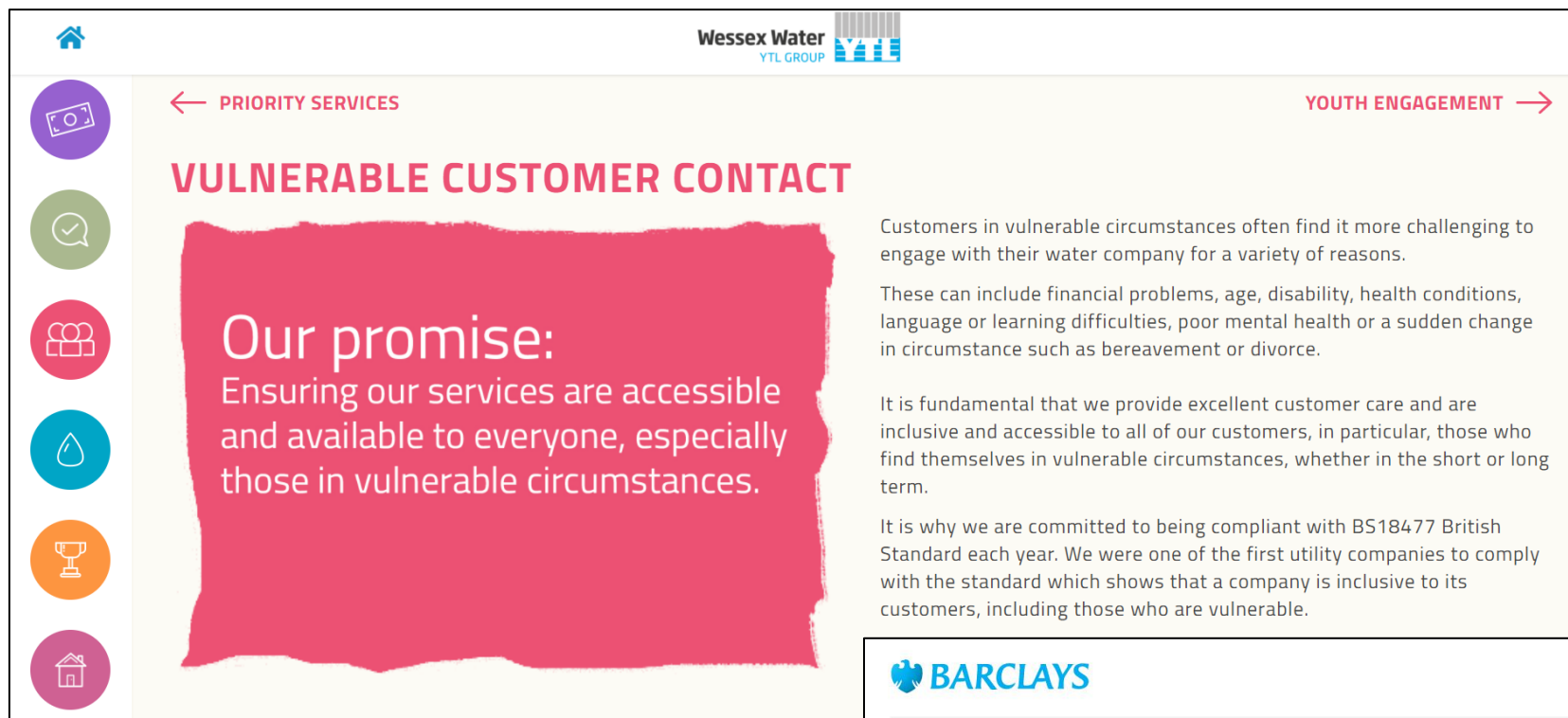
What do you need

It's not about

- Collecting data – this is not an outcome goal
- Labelling attributes against individual customers on our systems
- Reporting 'what'

It is about

- Knowing your customers and how this impacts and informs your service design
- Effectively hearing the voice of all customers
- Being able to measure outcomes



Wessex Water
YTL GROUP

← PRIORITY SERVICES

YOUTH ENGAGEMENT →

VULNERABLE CUSTOMER CONTACT


Our promise:
Ensuring our services are accessible and available to everyone, especially those in vulnerable circumstances.

Customers in vulnerable circumstances often find it more challenging to engage with their water company for a variety of reasons.

These can include financial problems, age, disability, health conditions, language or learning difficulties, poor mental health or a sudden change in circumstance such as bereavement or divorce.

It is fundamental that we provide excellent customer care and are inclusive and accessible to all of our customers, in particular, those who find themselves in vulnerable circumstances, whether in the short or long term.

It is why we are committed to being compliant with BS18477 British Standard each year. We were one of the first utility companies to comply with the standard which shows that a company is inclusive to its customers, including those who are vulnerable.

 BARCLAYS

Treating customers fairly



Ofcom have set out five distinct areas where companies can take action to support vulnerable customers and treat them fairly:

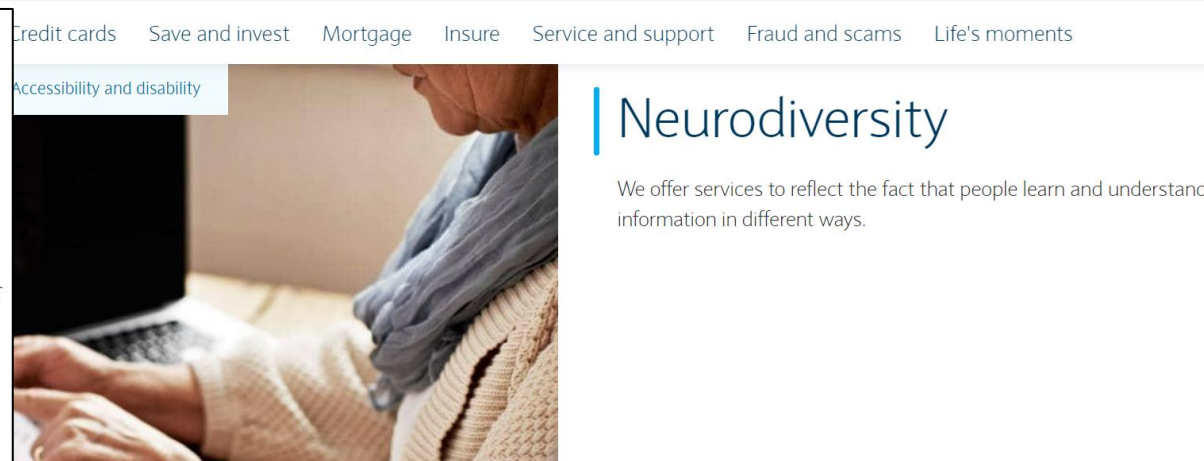
- Companies should publish policies for treating vulnerable customers fairly which are easy to understand and up to date
- Customers should be asked about potential vulnerabilities at the earliest opportunity to help identify them and communicate their support options
- Frontline staff should record and update customer information on a secure system accessible by other frontline staff to minimise the need for customers to repeat themselves if passed from department to department
- Staff should be trained appropriately and should be able to communicate with empathy and support, recognising the potential signifiers of vulnerability which a customer may be unwilling to explicitly address
- Companies should monitor and evaluate changes in their complaint levels, customer service survey results or any other feedback they receive from customers to check they're living up to the spirit of the guidance



British Gas

You can register if you:

- are over 65
- have a disability or long-term illness
- rely on medical equipment in your home
- have a child or children under the age of five
- have gone through a recent bereavement, break-up or job loss
- are recovering from a hospital treatment
- are living independently for the first time



Credit cards Save and invest Mortgage Insure Service and support Fraud and scams Life's moments

Accessibility and disability

Neurodiversity

We offer services to reflect the fact that people learn and understand information in different ways.

Regulatory standards – involvement and empowerment

Theme
Wide range of opportunities to influence & be involved
Scrutiny & performance – incl. provision of timely & relevant performance info & ability to make recommendations
Understanding & responding to diverse needs of tenants
Provide tenants with accessible, relevant & timely info about arrangements for tenant involvement & scrutiny
Complaints – range of ways to express a complaint and reporting on performance
Publication of an annual report
Building tenant capacity to be more effectively involved
Consult with tenants on monitoring & performance & governance & scrutiny
Demonstrate to tenants how outcomes of consultations have been taken into account in decision making
Demonstrate how we respond to tenants' needs in service delivery and communications



It will take time for us to reshape our consumer regulation so that it delivers what the Social Housing White Paper sets out, but good landlords won't be waiting around for us to complete our work.

They can make a real head start by listening to tenants, increasing their transparency, and where they need to, improving their services so they are always high quality and robust.

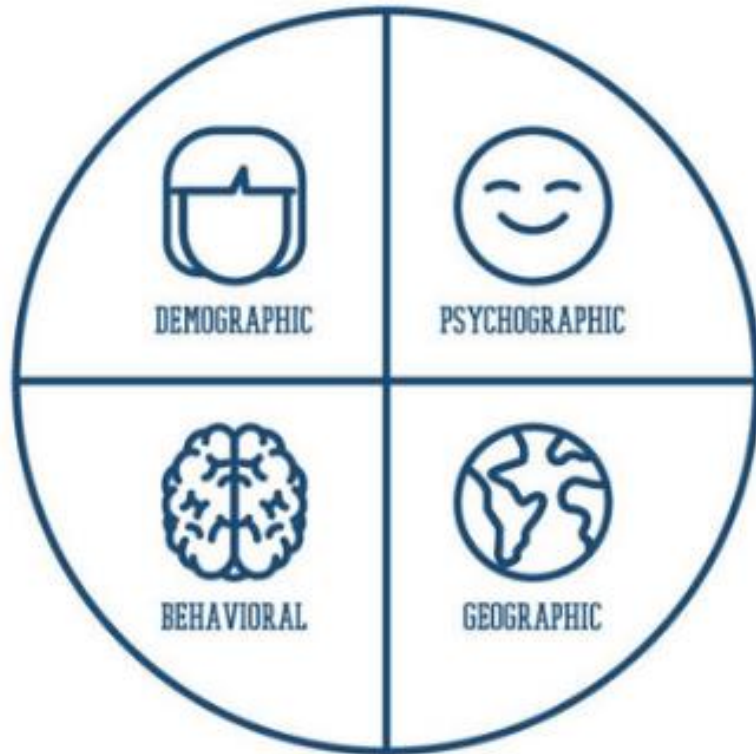
— KATE DODSWORTH
Director of Consumer Regulation



The white paper is clear in its expectations around how landlords will be expected to develop their future activity, particularly:

- Tailor their engagement in the future
- Embed a culture of continuous improvement in landlords' approach to tenant engagement
- Ensure landlords do more to draw on and learn from best practice on engagement, including from other sectors
- The Regulator of Social Housing will require landlords to show how they have sought out and considered ways to improve tenant engagement

Different types of segmentation



Demographic or life stage segmentation

This customer segmentation method is one of the most commonly used because it's easy to acquire through census data and internal data sets.

Value is limited to marketing strategies and has value when designing and delivering marketing activity and campaign activity across geographical areas or targeting mass populations.

Segmentation means a better experience for our customers and efficiency for the business

The survey contained over 50 attitudinal statements and additional questions relating to conditions. Behavioural, demographic and asset information also included



Me and my life day to day
Routines, hobbies, interests, worries, what's important to them
What makes them who they are?



Me and my life in the future
What is their outlook on life?
Aspirations?



Me and my finances and employment
Feelings around financial security, ability to manage finances, identifying support needs



Me and my environment / community
How do they feel about their environment?



Me and my home
What is home to them? How do they feel about their homes?
Identifying challenges managing their tenancy



Me and social housing
Journey to social housing and experience in other settings



Me and Grand Union
Relationship with Grand Union, experiences: communication repairs and maintenance support services.



Me and customer service
Contact with GU, when and what. Do they feel valued by GU? Do they feel they have a voice? GU make their lives easier?



Me and my health
Physical, mental, cognitive



Me and things affecting me
Covid, weight management, smoking etc.

Three quarters of our customers have at least one condition that affects them on a daily basis

Physical conditions

Conditions affecting physical health. This can include both illness, disease and chronic conditions. Examples include: Arthritis, Diabetes, Cancer, back problems and COPD.



Mental health conditions

Conditions affecting mental health. This can include a range of conditions. Examples include: Depression, Anxiety, OCD, PTSD, Eating disorders, Bipolar and Schizophrenia.

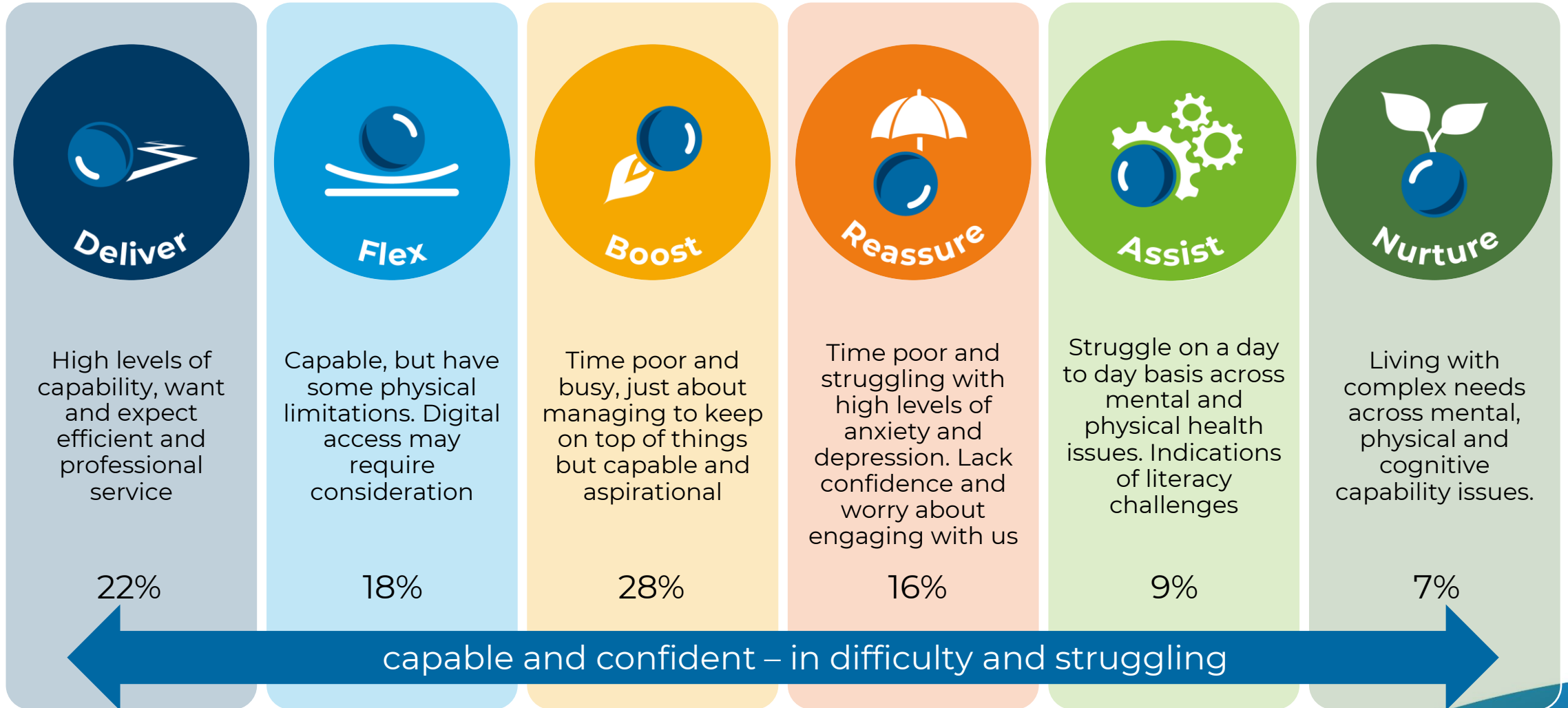


Cognitive conditions

Conditions affecting capability. Can have mental and physical difficulties. This area is complex and principally covers three areas: Learning Disabilities – Dyslexia, Dyscalculia. Developmental Disorders – Autism, Asperger's, ADHD. Neurodegenerative Diseases – Alzheimer's and Dementia.



Introducing our segments





They feel: Struggling with multiple issues
Our approach: Consistency and understanding. Adapted communications

7% (1,000)



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Our approach: Consistency & understanding.
Adapted communications
7% (1,000)

“Most days I find it hard to deal with everything that’s going on. I’ve got a lot on my plate now, let alone thinking about the future. I find it difficult to maintain my home, even cleaning is a challenge for me. I feel depressed and anxious most of the time.

Even though I'm struggling quite a lot, I find it hard to ask for help. I've got multiple challenges with my physical and mental health, and I'm not able to work because of them. I've not got much money – what with bills and rent and paying my debts there isn't anything left over, and I sometimes have to use a foodbank.

I'm lonely, and some weeks I won't talk to anyone. I have trouble understanding documents and what people are saying to me. I prefer to not have to talk to people that I don't know if I can help it. I'm not at all confident dealing with people in authority.”



About me

- 35-54
- Most not working due to illness or disability



Health

- Have multiple health issues
- Mix of mental and physical ill health, primarily mental



Cognitive

- Quarter have cognitive issues
- Likely to have trouble reading
- Issues with following conversations



Finances

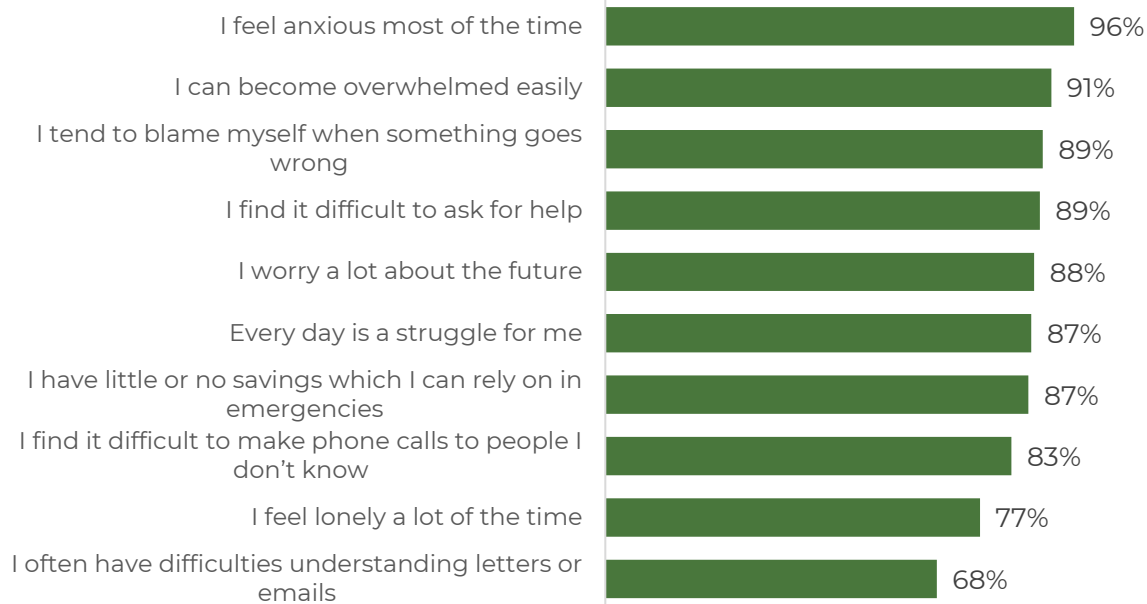
- Multiple benefits
- Struggle with money management
- Use online banking



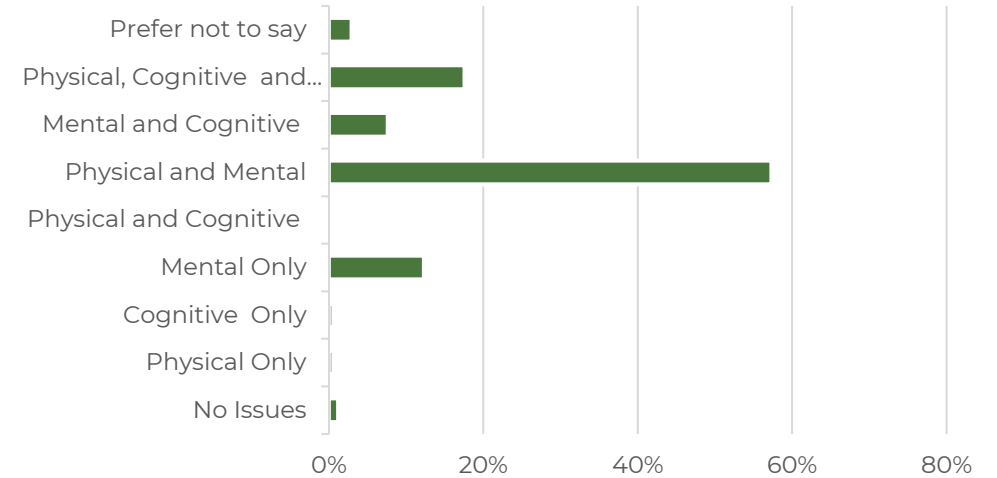
Digital & comms

- Find it difficult to complain
- Likely to ignore official communications
- Have internet access
- Own a Smartphone

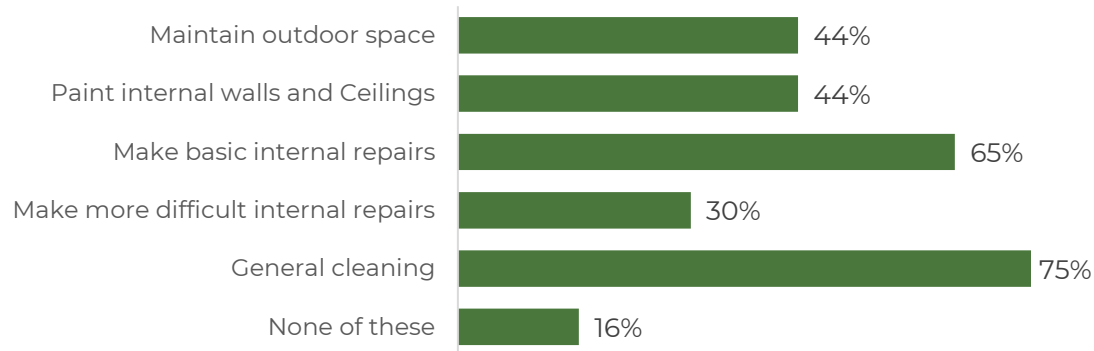
Key statements



Conditions affecting day to day life



Home maintenance



What does this mean for us?

- Struggling in multiple areas
- Consideration to multiple issues across physical, mental and cognitive health
- Need a proactive and supportive service
- Simplicity in service style
- Potential vulnerabilities
- Equality considerations in service and policy development

A personalised, branded, mobile first panel site to host ongoing engagement



- Grand Union Voice – a distinctive identity that will be available for customers & colleagues
- View activities, live as they happen
- Let customers start their own conversations: true blue-sky thinking
- Always-on, personalised activities to engage members & maximise impact



A comprehensive toolkit to deliver across qualitative and quantitative questions with options that consider capability and inclusivity



What customers tell us



Surveys & polls



Personal diaries



Online Focus Groups



Discussion forums

Customer intel held



Profiling



Segmentation



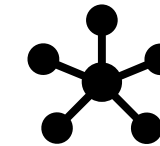
Research responses



Participation data

▶ Data access

▶ Data Integration



▶ Data management

▶ Data Visualisation

Behaviour and emotion

Visual Semiotics

Implicit Association Testing

Choice based ideation

Interactive highlighters

What you need to know



24/7 real time portal



Reporting & analytics



Infographics & videos



Insight workshops

Other areas of implementation

- Assessment at tenancy start
- Informing and reframing our service approach
- Translated segmentation into key behaviours
- Building behaviour training for all colleagues
- Considering a vulnerable customer lens to build all customer service
- Measuring customer experience at segment level
- Developing a less binary approach to policy